Perceptive Content

Manage Forms User Guide

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Manage forms

Set form privileges

To set form privileges, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In the right pane, in the **Form** list, select the form you want and then click **Modify**.
4. In the **Form** dialog box, in the left pane, click **Security**.
5. In the right pane, in the **Select a presentation** box, select a presentation.
6. Under **Users/Groups**, click **Add**.
7. In the **Form** dialog box, under **Users/Groups**, select the user or group you want to grant privileges to.
8. In the **Privileges** list, click the column to the left of the **Forms** privilege so that it is displayed for the following privileges as needed:
   - To view the form and its data, grant the View privilege. The View privilege is required to make the other privileges effective.
   - To modify the data for that form, grant the Modify privilege.
   - To enter data into new instances of that form, grant the Create privilege.
   - To delete data in that form, grant the Delete privilege.
   - Repeat these steps for each user and group who needs access to the form.

About creating forms in Form Designer

Form Designer allows you to create and publish forms without the need for scripting or technical development, as well as the ability to create the fields on a form using custom properties in Perceptive Content.

Creating fields from custom properties optionally allows the system to complete custom properties using the data a user enters in the form fields. This synchronization makes the form field data searchable.

When publishing in Form Designer, you create a document type or folder type. You can choose to automatically populate the document keys or project name from information a user enters in form fields when submitting a form through an embedded URL.

About defining form security

To deploy forms, you must grant the appropriate privileges to a user or group based on the type of form you create and any security considerations.

The following examples highlight some of the more common scenarios that you may encounter. Although this topic does not describe all of the possible associated privilege combinations for every type of form you can create, it provides some higher level concepts to remember while creating and deploying the form. Consider the following common scenarios for privileges when deploying forms.

- `Forms displayed as stand-alone documents.` Stand-alone document forms appear in ImageNowViewer or Perceptive Content Folder Viewer as the primary document. Because each form is associated with a drawer, the user must have privileges for the drawer to access the form.
- `Forms displayed as supplemental information for documents or folders.` Forms associated with a document or folder appear in the Forms pane and are associated with a document or folder in ImageNowViewer or Perceptive Content Folder Viewer.
- `Forms displayed as stand-alone on folders.` Stand-alone forms appear in Perceptive Content Folder Viewer. Because this form is created as a folder type, you must grant Folder Type privileges for this type of form.
- `Synchronize data.` In Form Designer, you can choose how to synchronize information between the form fields and the custom properties in Perceptive Content. When a user updates the data in a form field, the system automatically updates the corresponding custom properties for the document or folder.
- `Forms in a workflow.` When you associate a form to a workflow queue, the workflow privileges overwrite any Drawer or Folder privileges.

Associate a form with a workflow queue

To associate a form with a workflow queue, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. On the **Workflow** tab, select a process and then click **Modify**.
4. In the **Workflow Designer** dialog box, select a queue and then press `ENTER`.
5. In the **Queue Properties** dialog box, in the left pane, click **Forms**.
6. You can perform the following associations:
    - To attach forms to this queue, click **Add**, in the **Select Forms** dialog box, select the forms you want to add, and then click **OK**.
    - To remove a form from this queue, select the form in the list and then click **Remove**.
    - To change the default form associated with this queue, select the form in the list and click **Set as Default**.
7. Repeat the previous step for any additional queues.
8. When you are done associating forms, click **OK**.

Create a form

To create a new form you can build in Form Designer, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In the right pane, on the **Forms** tab, click **New**.
4. Type a unique name for your form and then press `ENTER`.

Delete a form

You can only delete forms that have no associated data. To delete a form, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In right pane, on the **Forms** tab, select a form and then click **Delete**.
4. In the confirmation dialog, click **Yes**.
5. To prevent further use of the form, if the selected form has data associated with it, in the **Delete Form** dialog box, click **Yes** to Mark Form as inactive and retain existing form data.

Make a form active or inactive

Set a form to inactive when you want to retain and view existing data, but you no longer want users to enter or modify form data. If you want to prevent users from using the form temporarily, revoke the user privileges for that period of time. To make a form active or inactive, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In the left pane, on the **Forms** tab, select the form you want to make active or inactive and then click **Modify**.
4. In the **Form** dialog box, in the General section, under **Options**, select the Is **Active** check box to make the form active or clear the check box to make the form inactive.
5. Click **OK**.

Display or hide an inactive form

To display or hide an inactive form, complete the following steps.

1. In **Management Console**, in the left pane, click **Forms**.
2. In the right pane, on the **Forms** tab, select the **Show inactive forms** check box to display inactive forms or clear the check box to hide inactive forms in this list.

Verify form functions

To verify that the form was loaded into Perceptive Content successfully and the code works correctly, complete the following steps.

1. Open an item in workflow.
2. In the **Forms** pane on the **Viewer** window, in the **Forms** list, select the available form you want to use.

   Note: This step is necessary only if the form you want is not set as the default form when there is more than one form available with that workflow queue.

3. Type data into all of the fields on the form and then, in **Perceptive Content**, on the **File** menu, click **Save**.

   This step verifies the data entry as well as any data validation you coded.
4. If the form has the ability to add or delete rows or repeat sections in a table, click those buttons to test them.
5. If you added any JavaScript, verify the scripts.
6. Before exiting the form, click the **red X** to remove the data. This step prevents the form from having any associated data, which prevents you from modifying or deleting the form files during testing.
7. If there are any errors, you must correct the errors in your local form files and then reload them into **ImageNow Server**.
8. Perform this verification procedure on both the **ImageNow Client** and **ImageNow Server** to ensure that the forms look and function the same.

Manage manual forms

About administering manual forms

You can manually create forms using external tools instead of using Form Designer. Manual forms must be manually deployed into Perceptive Content.

If you choose not to use Form Designer to create your forms, you can use standard HTML, XSL, and XML to create form files using external editing tools (such as Microsoft FrontPage or Adobe DreamWeaver). You can also use external editing tools to extend the functionality of forms that you create using Form Designer, but you must then manually deploy your form in Perceptive Content.

The following files are used in forms in Perceptive Content, although you can optionally use CSS, graphics, and JavaScript.

Presentation Template This XSL file describes how to present the XML data in the form. You can use many presentations with a single XML source file, so you can create different formatting or views of the data for each form you create. Each presentation can have different security settings. Through these settings, you can control access to your forms. Additionally, external ODBC access is provided through iScript, a scripting language available with Perceptive Content.

Data Definition This XML file contains the schema used to save data instances in data content record files. You can also add data to elements in this file to pre-populate fields in your form the first time it is displayed to a user.

Data Content Record This XML file contains individual instances of form data based on a corresponding data definition file. The data captured during form processing is stored for viewing, editing, searching, and archiving purposes. Perceptive Content creates and maintains the data content record files for you based on your data definition file. Perceptive Content stores these records as subobjects.

If you are using external editing tools to create form files, the system does not support files encoded with UTF-8 with BOM.

Manually deploy a form overview

To get started manually deploying a form, complete the following sequence of procedures.

1. Manually upload form definition files.
2. Create a form.
3. Add a data definition and presentation to a form.
4. Set form privileges.
5. Optional. Associate a form with a workflow queue.
6. Verify form functions.

Manually upload form definition files

To manually upload an XML data definition file, XSL files, supporting files, and organize your files into presentations, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In the right pane, click **Manage Components Manually**.

4. On the **Manage Form Components** dialog box, do any of the following procedures:

Situation	Steps
Upload an XML data definition file	1. In the **Data Definitions** pane, click **Add**. 2. In the **File Open** dialog box, navigate to the folder where your local form files are stored, select the XML file you created for this form and then click **Open**.
Upload files to share with more than one presentation.	1. In the **Shared Files** pane and then click **Add**. 2. In the **Shared Files** dialog box, select the optional files you created that you want to share with more than one presentation and then click **Open**.
Create a presentation	1. On the **Presentations** pane, click **Create**, type a name for your presentation and then press `ENTER`. 2. Select the presentation you just created and click **Modify**. 3. Optional. In the **Presentation** dialog box, in the **General** pane, type a description for your presentation.
Upload an XSL file for your presentation	1. In the presentation, in the **Files** pane, click **Add**, select the XSL file and any optional files you created for this presentation. 2. Click **Open**. 3. If you previously added shared files that you want to use in this presentation, click **Select Shared Files**, in the **Select Shared Files** dialog box, select the files you want and then click **OK**. 4. If you created more than one XSL file to use with your XML file, repeat these steps for each XSL file.

5. Click **OK**.

Create a form

To create a new form you can build in Form Designer, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the

list.

2. In the left pane, click **Forms**.
3. In the right pane, on the **Forms** tab, click **New**.
4. Type a unique name for your form and then press `ENTER`.

Add a data definition and presentation to a form

To define an existing data definition file and presentation for a form, complete the following steps.

Prerequisite Before completing this procedure, you must upload the data definition and presentation files.

1. In **Management Console**, on the left pane, click **Forms**.
2. In the right pane, select a form and click **Modify**.
3. In the left pane, click **Components**.
4. In the right pane, under **Data Definition**, in the **Data definition list** box, select the XML file you created for this form.
5. Click **Select** to choose presentations you want to be available for use with this form, in the **Select Presentations** dialog box select the presentations and then click **OK**.
6. Click **OK**.

Set form privileges

To set form privileges, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In the right pane, in the **Form** list, select the form you want and then click **Modify**.
4. In the **Form** dialog box, in the left pane, click **Security**.
5. In the right pane, in the **Select a presentation** box, select a presentation.
6. Under **Users/Groups**, click **Add**.
7. In the **Form** dialog box, under **Users/Groups**, select the user or group you want to grant privileges to.
8. In the **Privileges** list, click the column to the left of the **Forms** privilege so that it is displayed for the following privileges as needed:
   - To view the form and its data, grant the View privilege. The View privilege is required to make the other privileges effective.
   - To modify the data for that form, grant the Modify privilege.
   - To enter data into new instances of that form, grant the Create privilege.
   - To delete data in that form, grant the Delete privilege.
   - Repeat these steps for each user and group who needs access to the form.

Associate a form with a workflow queue

To associate a form with a workflow queue, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. On the **Workflow** tab, select a process and then click **Modify**.
4. In the **Workflow Designer** dialog box, select a queue and then press `ENTER`.
5. In the **Queue Properties** dialog box, in the left pane, click **Forms**.
6. You can perform the following associations:
   - To attach forms to this queue, click **Add**, in the **Select Forms** dialog box, select the forms you want to add, and then click **OK**.
   - To remove a form from this queue, select the form in the list and then click **Remove**.
   - To change the default form associated with this queue, select the form in the list and click **Set as Default**.
7. Repeat the previous step for any additional queues.
8. When you are done associating forms, click **OK**.

Verify form functions

To verify that the form was loaded into Perceptive Content successfully and the code works correctly, complete the following steps.

1. Open an item in workflow.
2. In the **Forms** pane on the **Viewer** window, in the **Forms** list, select the available form you want to use.

   Note: This step is necessary only if the form you want is not set as the default form when there is more than one form available with that workflow queue.

3. Type data into all of the fields on the form and then, in **Perceptive Content**, on the **File** menu, click **Save**.

   This step verifies the data entry as well as any data validation you coded.
4. If the form has the ability to add or delete rows or repeat sections in a table, click those buttons to test them.
5. If you added any JavaScript, verify the scripts.
6. Before exiting the form, click the **red X** to remove the data. This step prevents the form from having any associated data, which prevents you from modifying or deleting the form files during testing.
7. If there are any errors, you must correct the errors in your local form files and then reload them into **ImageNow Server**.
8. Perform this verification procedure on both the **ImageNow Client** and **ImageNow Server** to ensure that the forms look and function the same.

Manually modify form settings

To manually modify form settings, complete the following steps.

Prerequisite A Forms license is required to use forms. If you need a Forms license, contact your Perceptive Software representative.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In the right pane, select a form and then click **Modify**.
4. In the **Form** dialog box, you can make the following changes to your form:
   - In the **General** pane, you can modify the form name, description, and set the form to active or inactive.
   - In the **Components** pane, you can change the data definition file to use with this form and which presentations are available for this form.
   - In the **Security** pane, you can grant or deny form privileges to users and groups.
5. When you are done modifying the form, click **OK**.

Manually modify form components

To manually modify form components, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In the right pane, on the **Forms** tab, click **Manage Components Manually**.
4. To modify data definitions, complete the following substeps:
   1. To replace a data definition file, select the existing data definition in the forms list and then click **Replace**.
   2. In the **Replace confirmation** dialog box, click **Yes**.
5. Navigate to the XML file you wish to use to replace the existing one and then click **Open**.

   Note: Replacing your data definition file can cause existing XML instances to become corrupted. This is especially true if you have moved or modified an existing element. Adding new elements should not corrupt data, but the elements in the existing XML instances will not be populated, so you need to populate them.

6. To remove a data definition file, select the existing data definition in the form list and then click **Remove**.

   Note: Changes to form files do not affect users who are currently logged in until they log out and in again.

7. To replace an optional file, select the existing file in the list and then click **Replace**.

8. In the **Replace confirmation** dialog box, click **Yes**.
9. Navigate to the file you wish to use to replace the existing one and then click **Open**.
10. To remove a file, select the existing optional file in the list and then click **Remove**.
11. To modify a presentation, select the presentation in the list and click **Modify**.

    Note: Changes to form files do not affect users who are currently logged in until they log out and in again.

12. In the **General** pane, you can change the presentation name and description.
13. In the **Files** pane, to add files to an existing presentation, click **Add**, navigate to the file and then click **Open**.
14. To add shared files on the **ImageNow Server**to the presentation, click **Select Shared Files**, select the files and then click **OK**.
15. To replace a file, select the file in the list, click **Replace**, navigate to the new file and then click **Open**.
16. To remove a file, select the file in the list and then click **Remove**.
17. In the **Presentation** dialog box, when you are finished making changes, click **OK**.
18. To remove a presentation, select the presentation in the list and click **Remove**.

    Note: Changes to form files do not affect users who are currently logged in until they log out and in again.

19. When you are finished modifying components, click **OK**.

Manually add a form to a document type

To select a form to associate with a document displayed in ImageNowViewer or WebNowViewer, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Document Types**.
3. Select a document type and then click **Modify**.
4. In the **Document Type** dialog box, in the **General** tab, check the **Is a form** check box, and then select a form in the **Form** list.
5. Click **OK**.

Manually add a form to a folder type

To select an existing form to associate with a folder displayed in Perceptive ContentFolder Viewer, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Folder Types**.
3. Select a folder type name and click **Modify**.

4. In the **Folder Type** dialog box, in the **General** tab, check the **I**s a form check box, and then select a form in the **Form** list.
5. Click **OK**.

Result Whenever you create a new folder based on this folder type, you must add it to a workflow queue. Otherwise, the user of folder cannot access it.

Manually upload form definition files

To manually upload an XML data definition file, XSL files, supporting files, and organize your files into presentations, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In the right pane, click **Manage Components Manually**.

4. On the **Manage Form Components** dialog box, do any of the following procedures:

Situation	Steps
Upload an XML data definition file	1. In the **Data Definitions** pane, click **Add**. 2. In the **File Open** dialog box, navigate to the folder where your local form files are stored, select the XML file you created for this form and then click **Open**.
Upload files to share with more than one presentation.	1. In the **Shared Files** pane and then click **Add**. 2. In the **Shared Files** dialog box, select the optional files you created that you want to share with more than one presentation and then click **Open**.
Create a presentation	1. On the **Presentations** pane, click **Create**, type a name for your presentation and then press `ENTER`. 2. Select the presentation you just created and click **Modify**. 3. Optional. In the **Presentation** dialog box, in the **General** pane, type a description for your presentation.
Upload an XSL file for your presentation	1. In the presentation, in the **Files** pane, click **Add**, select the XSL file and any optional files you created for this presentation. 2. Click **Open**. 3. If you previously added shared files that you want to use in this presentation, click **Select Shared Files**, in the **Select Shared Files** dialog box, select the files you want and then click **OK**. 4. If you created more than one XSL file to use with your XML file, repeat these steps for each XSL file.

5. Click **OK**.

Add a shared form file

To manually add shared form files into Perceptive Content, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the

list.

2. In the left pane, click **Forms**.
3. In the right pane, click **Manage Form Components**.
4. In the **Manage Form Components** dialog box, in the left pane, click **Shared Files > Add**.
5. In the **File Open** dialog box, navigate to the folder where your local form files are stored, select the files you want to add and then click **Open**.
6. Click **OK**.

Remove a shared form file

To remove shared files from a form, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Forms**.
3. In the right pane, click **Manage Components Manually**.
4. In the **Manage Form Components** dialog box, in the left pane, click **Shared Files**.
5. In the list of shared files, select the shared files you want to remove and then click **Remove**.
6. Click **OK**.

Troubleshoot a form

Use the following information to troubleshoot a form.

Error Messages

Message	**Resolution**
XML page cannot be displayed	If this error appears in the Forms pane, Perceptive Content cannot transform the files due to an error in your XML or XSL file. Correct the errors and then re-load the files into Perceptive Content.

JavaScript errors

If JavaScript does not execute successfully in your form, try one of these possible resolutions.

Cause	**Resolution**
Comments are formatted incorrectly.	For Perceptive Content, you cannot use // to denote comments in your JavaScript, use /* */ instead.

Cause	Resolution
A browser component is not supported.	Perceptive Content does not support a full browser environment, so plug-ins such as Active X, Java applets, and Flash are not supported as part of a form.

Unable to find or view forms

If you are unable to find a form in Perceptive Content or view the form in ImageNowViewer, try one of the following possible resolutions.

Cause	Resolution
The Forms pane is not displayed in ImageNowViewer.	Click **View > Forms**.

Manage item properties

What is a custom property?

A custom property is a property field that is populated with data relating to an item or container.

A custom property allows you to store unlimited data beyond the standard item properties or container structure. You make custom properties available to items and containers by assigning them to item types or container types.

You can define a custom property using one of the following data types: Composite, Date, Flag, List, Number, String, and User. Formatting settings let you control the data entry and display appearance of the custom property for viewing by your end users. If you choose the Composite data type, you can create a composite property that is a single property that contains one or more custom properties. Some data types require default values. For others, default values are optional.

Suppose, for example, that the Human Resources Department has a "New Hire" folder type that is used to create a folder for each new employee. When Human Resources hires a new Marketing director, the user creates a new folder using the New Hire folder type and enters the following custom property values in Perceptive Content for the folder:

- A string custom property for "Job Title" with the value "Marketing Director".
- A date custom property for "Date of Hire" with the value "05/08/2012".

As another example, a document assigned with the "Medical Enrollment Form" document type is added to each new employee's folder. When the new employee completes the form, the user enters the following custom property values in Perceptive Content for the document:

- A list custom property for "Plan Year" with the value "2012".
- A date custom property for "Coverage Start Date" with the value "06/01/2012".

What is a composite property?

A composite property allows you to store multiple values or sets of values that are based on one or more existing custom properties, and group and refine the metadata that your users use to describe the documents and folders in your system.

Composite properties also allow users to store differing numbers of values in a single property. In the custom properties of a document or folder, the user can add values to, change existing values in, or remove values from a composite property at any time.

You can perform a search to locate documents, folders, and workflow items based on composite property values just as you would when searching on any document or folder property.

The following examples show how you might use composite properties:

- You define a composite property to store values using a single custom property. In this example, suppose you are tracking test scores for a student. Whenever a student repeats a test, the user tracking the test scores must add the new score to the Test Results property in that student's document. For one student, the score might contain one value, and for another it may contain fifteen values.
- You define a composite property to store sets of values using multiple custom properties. Expanding on the previous example, suppose the user tracking the test scores needs to enter a date along with each test score and a flag value that indicates whether a retest is required. This expanded Test Results property contains one property set for a student who has taken the test only once, but for a student who has taken the test and then retested five times, it contains six property sets, each with its own score, date, and retest values.

Create a custom property overview

To create a custom property you can assign to a document or folder type or use as part of a composite property, complete any of the following procedures.

- Create a date custom property.
- Create a flag custom property
- Create a list custom property
- Create a number custom property.
- Create a string custom property.
- Create a user custom property.

Create a date custom property

To create a custom property that stores a date value, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Custom Properties**.

3. In the right pane, click **New > Date**.
4. In the **New Date Property** dialog box, in the **Name** box, type the name of the custom property.
5. In **Default value** list, do one of the following options:
   - To use the current date as the default value, select the **Default to the current date** check box.
   - To select a date to use as the default value, clear the **Default to the current date** check box and select the desired default date in the **Default value** list.
   - To use no default value, leave the default value empty and clear the checkbox.
6. In the **Display Format** section, select the **Month**, **Day**, **Year**, and **Weekday** check boxes to show the respective portion of the date.
7. Click **OK**.

Next You can assign the custom property to a document type, folder type, record type, record folder type, or composite property.

Create a flag custom property

To create a custom property that stores a flag, or boolean value, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Custom Properties**.
3. Click **New > Flag**.
4. In the **New Flag Property** dialog box, in the **Name** box, type a name for the custom property.
5. Optional. In the **Default value** list, select **True** or **False** for the default value for this custom property.

   > **Note:** If you leave this setting empty, no default value appears in the custom property.

6. In the **Positive Label** box, type the value to display when the condition is true.
7. In the **Negative Label** box, type the value to display when the condition is false.

   > **Note:** The Flag property stores values of 0 or 1 based on the value that is selected by the user. The **Positive Label** and **Negative Label** boxes allow you to adjust the labels that represent the stored values.

8. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Create a list custom property

To create a custom property that stores a value from a predefined list, complete the following steps.

Prerequisite This procedure requires the **Global > Manage > Custom Properties** privilege.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Custom Properties**.

3. In the right pane, click **New > List**.
4. In the **New List Property** dialog box, in the **Name** box, type a name for the custom property.
5. To add items to the list, do the following substeps:
    1. Under **Display Format**, in the **Values** list, click **Add**.
    2. Type the value for the list item and then press `ENTER`.
    3. Repeat the previous substeps for each value you want to display in the list.
    4. Optional. After you add all list items, use the **Move Up** and **Move Down** buttons to rearrange the order of the list items.
6. Optional. In the **Default value** list, select the default list item value for this custom property.
7. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Create a number custom property

To create a custom property that stores a numeric value, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click **New > Number**.
3. In the **New Number Property** dialog box, in the **Name** box, type a name for this custom property.
4. Optional. In the **Default value** box, type the number to use for the default value for this custom property.
5. Under **Display Format**, complete the following substeps.
    1. In the **Format** list, select **Currency** or **Decimal**.

        Note: Select **Currency** format for currency values and **Decimal** format for standard numeric values.

    2. If you are using **Currency** format, select the currency type from the list.
    3. If you are using **Decimal** format, select whether the decimals are **Fixed** or **Varying**.
    4. If you are using **Decimal** format, in the **Decimal Places** box, type or select the number of decimal places.

        Note: If you are using a varying decimal value for a numeric value, you cannot set the number of decimal places.

    5. Optional. To remove the thousands separator from numbers greater than 999, clear the **Punctuated at thousands** check box.
6. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Create a string custom property

To create a custom property that stores a string value, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click **New > String**.
3. In the **New String Property** dialog box, in the **Name** box, type a name for the custom property.
4. Optional. In the **Default value** box, type the default string value for this custom property.
5. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Create a user custom property

To create a custom property that stores a username value, complete the following steps.

Prerequisite This procedure requires the **Global > Manage > Custom Properties** privilege.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click **New > User**.
3. In the **New User Property** dialog box, in the **Name** box, type a name for the custom property, and then do one of the following options:
   - To select user values from a group, complete the following substeps.
     1. In the Source list, select **Group**.
     2. In the **Group** list, select the group.
   - To select user values from a predefined list, complete the following substeps.
     1. In the Source list, select **Predefined list**.
     2. Click **Add**.
     3. In the **Select Users** dialog box, search for and select the users you want to add to the list and click **OK**.
     4. Reorder the list members as necessary.
4. Optional. In the **Default Value** list, select the default user.
5. Under **Display Format**, in the **Format** list, select a display format.
6. Optional. If you selected a display format other than **User name**, to display the prefix or suffix in the user’s user profile when displaying this custom property, select the **Display prefix** and **Display suffix** check boxes.
7. Click **OK**.

Next You can assign the custom property to a document type, folder type, or composite property.

Assign a custom property to a document type

To assign a custom property to a document type, complete the following steps.

Prerequisite Because assigning a custom property to a document type that is already in use can take a long time, cause a potentially unacceptable delay, and use significant resources, we recommend you perform this procedure during non-peak hours.

1. In **Management Console**, in the left pane, click **Document Types**.
2. On the **Document Types** tab, select the document type for which you want to assign a custom property and then click **Modify**.
3. Optional. In the **Document Type** dialog box, on the **Custom Properties** tab, to filter the available custom properties by data type, in the **By Type** list, select the data type you want.
4. In the **Document Type** dialog box, on the **Custom Properties** tab, in the **Available** list, select the custom property you want to add, click **Add**, and then, on the **Add Custom Properties** confirmation dialog box, click **Yes**.
5. If the document type is already in use, in the **Add Custom Property** dialog box, determine how to populate existing custom property values for all documents that are assigned any document types that use this custom property:
   - Select **Use the Default Value** assigned to this property to automatically populate existing custom properties with the default value you specified when you created the custom property.
   - Select **Leave blank** to populate existing custom properties with no value.
   - Select **Use to** type or select a value to populate existing custom properties.
6. Click **OK** and, if you receive another confirmation dialog box indicating the update could take a long time and use significant resources, click **Yes** only if you are sure this will not create an unacceptable delay. Otherwise, click **No** or **Cancel** and repeat the procedure during non-peak hours.
7. Optional. To make a custom property required, in the **Added** list, click once in the column in front of the custom property until is displayed. A required custom property must contain a value whenever the associated item is linked or you change the document type of the associated document.

Assign a custom property to a folder type

To assign a custom property to a folder type, complete the following steps.

1. In **Management Console**, in the left pane, click **Folder Types**.
2. On the **Folder Types** tab, in the **Folder Type** list, select the folder type for which you want to assign a custom property and click **Modify**.
3. Optional. In the **Folder Type** dialog box, on the **Custom Properties** tab, to filter the available custom properties by data type, in the **By Type** list, select the data type you want.
4. In the **Folder Type** dialog box, on the Custom **Properties** tab, in the **Available** list, select the custom property you want to add, click **Add**, and, on the **Add Custom Properties confirmation** dialog box, click **Yes**.
5. If the file type is already in use, in the **Add Custom Property** dialog box, determine how to populate existing custom property values for all folders that are of folder types that use this custom property:
   - Select **Use the Default Value** assigned to this property to automatically populate existing custom

properties with the default value you specified when you created the custom property.
- Select **Leave blank** to populate existing custom properties with no value.
- Select **Use** to type or select a value to populate existing custom properties.

6. Click **OK**, and if you receive another confirmation dialog box indicating the update could take a long time and use significant resources, click **Yes** only if you are sure this is not an issue. Otherwise, click **No** or **Cancel** and repeat the procedure during non-peak hours.
7. Optional. To make a custom property required, in the **Added** list, click once in the column in front of the custom property. The **Required** icon appears. A required custom property must contain a value whenever the associated item is linked or you change the folder type of the associated document.

Modify a custom property

To change settings for an existing custom property, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, select the custom property you want to modify, and then click **Modify**.
3. In the **Modify <Property Type> Property** dialog box, make your changes and then click **OK**.

Delete a custom property

To delete a custom property, complete the following steps.

Because deleting a custom property that is already in use can take a long time, cause a potentially unacceptable delay, and use significant resources, we recommend you perform this procedure during non-peak hours.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, select the custom property you want, and click **Delete**.
3. On the **Delete Property** dialog box, click **Yes**.

Custom property data types

You can choose from the following data types when you create a custom property. All custom property types can have a default value or contain an empty (or NULL) value.

Data Type Name	Data Type	Description	Value Restrictions
Composite	Inherits types from custom properties	A composite property allows the user to enter multiple values for a single property. If you select a single custom property, the user can add multiple	Values must conform to the data types of the associated custom properties.

Data Type Name	Data Type	Description	Value Restrictions
		values of the same data type to the composite. The values appear as numbered rows in the Custom Properties pane of the Viewer. If you select multiple custom properties, the user can add multiple property sets of the composite with separate sets of values for each set. Property sets appear as separate hierarchies in the Custom Properties pane of the Viewer.	
Date	Date field	A date stored as a string. The displayed date format is based on the settings chosen when you create the custom property.	Not applicable.
Flag	Boolean field	This data type is always stored as TRUE (1) or FALSE (0). The values that display are based on the settings chosen when creating the custom property.	1 or 0 but the display strings that represent the 1 can be altered.
List	Predefined List	This data type creates a group of values that a user can select from a list box for the custom property.	Not applicable.
Number	Decimal number field	Decimal data type display format: Number fields that support both positive and negative	Up to 16 digits. Precision of 15 decimal places.

Data Type Name	Data Type	Description	Value Restrictions
		numbers up to a limited number of digits. Zeros to the right of the decimal are suppressed. Currency data type display format: Number fields that display as currency defined using one of the ISO 4217 country codes. The default currency setting matches the local settings of the ImageNow Client computer.	
String	Text field	Text fields that support all printable ASCII characters within the Single Byte character set.	Value can contain up to 128 characters. This limit varies depending on your database platform.
User	User name	This data type allows you to select an Perceptive Content user to populate the custom property.	Only Perceptive Content users that currently exist in the implementation.

Create a composite property

To create a composite property, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click **New > Composite**.
3. In the **New Composite Property** dialog box, in the **Name** box, type the name of the composite property and do the following substeps:
    1. Optional. In the **By Type** list, select the data type of the custom property you want to add.
    2. In the **Available** list, select a custom property you want to include in the composite custom property and then click **Add**.
4. Repeat the previous substeps until you have added all the custom properties you need.
5. Optional. To reorder the hierarchy of custom properties within the composite, in the **Added** list, select the property you want to reorder and then click **Move Up** or **Move Down**.
6. Click **OK**.

Next You can assign the composite property to a document type, folder type, record type, or record folder type.

Modify a composite property

To change the name of a composite property or modify the custom properties associated with it, complete the following steps.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, select the composite property you want to modify.
3. To change the name of the composite property, in the **Modify Composite Property** dialog box, in the **Name** box, edit the name of the composite property.
4. To view a single custom property type in the **Available** list, in the **By type** list, select a property type.
5. In the **Available** list, select any additional custom properties you want to include in the composite property and then click **Add**.
6. To rearrange the hierarchy of custom properties within the composite, in the **Added** list, select the property you want to move and then click **Move Up** or **Move Down**.
7. To remove a custom property from the composite, in the **Added** list, select the property and then click **Remove**.
8. Click **OK**.

Manage processes

Tasks

About administering tasks

To administer tasks in Management Console, you create task templates for your users.

You can assign one or more users a task on a particular document or folder. You choose the task type that best matches the work that needs to be done. The three available task types are described below.

- `Document deficiency`. The document deficiency task type is used to indicate when a document is missing or is incomplete.
- `Pointer`. The pointer task type is used to draw attention to a specific document or folder location for further action.
- `Signature required on document`. The signature required on document task type is used when a user needs to digitally sign a document. To use this task type, a Document Management Suite license is required.

Task template security allows you to determine the roles your users have when working with tasks. You can also manage reasons and reason lists for the task templates.

Signatures required on document tasks created in Management Console are available for processing in Interact Desktop. In Interact Desktop, you can Complete, Return, or Skip a Signature required on a document task.

Troubleshoot tasks

If you experience issues using tasks, you can try any of the following possible resolutions.

I don’t see a document task in Folder Viewer

Cause	Resolution
If you create a document task and then add that document to a folder, the document task does not appear in the Tasks grid in Folder Viewer.	Only document tasks you create in Folder Viewer appear in the Tasks grid in Folder Viewer.

Not all location options are available when I create a task

Cause	Resolution
The task template you are using to create a task does not have the Task location set in the Components area of the task template.	Use a different task template or select an available location option.
When you are in Folder Viewer and do not have a document open in ImageNowViewer - Folder, the only Location option available is Folder.	To create a document or page task in Folder Viewer, the associated viewer, ImageNowViewer- Folder must be open.
When in ImageNowViewer, Folder is unavailable because you are not in a folder.	Folder is only available when you create a task in Folder Viewer.

Task Templates

Create a document deficiency task template overview

Document deficiency task templates define the structure of document deficiency tasks, which indicate when a document is missing or incomplete. To create and define a document deficiency task template, complete the following sequence of procedures.

1. Create a document deficiency task template.
2. Define task template properties.
3. Define task template components.
4. Optional. Define task template actions.
5. Define task template assignments.
6. Define task template reasons.
7. Define task template due date method.
8. Define task template security.

Create a signature required task template

To create a new signature required task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click **Signature required on document**.
4. Click **New**.

   The **Signature Required on Document Task** dialog box appears.

Next You must define the task template's general properties, components, actions, assignments, reason lists, due date, and security.

Create a pointer task template overview

To create a pointer task template, complete the following sequence of procedures.

1. Create a pointer task template.
2. Define task template properties.
3. Define task template components.
4. Optional. Define task templace actions.
5. Define task template assignments.
6. Define task template reasons.
7. Define task template due date method.
8. Define task template security.

Result The Incomplete Template dialog box appears if you do not define assignments, reason lists, or if you opted to send the folder to workflow when the task location is a document in a folder box, but did not select a queue. You can save this template in any of these states, but the template is set to inactive.

Modify a task template overview

To make changes to a task template, complete the following steps.

1. Open a task template.
2. Define task template properties.
3. Define task template components.
4. Optional. Define task template actions.
5. Define task template assignments.
6. Define task template reasons.
7. Define task template due date method.
8. Define task template security.

Copy a task template

Task templates specify various options for task creation. To copy a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click a task type.
4. In the **Templates** list, click a template and then click **Copy**.
5. In the **Name** column, type a name and then press `ENTER`.

Rename a task template

To assign a new name to a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click a task type.
4. In the **Templates** list, click a template and click **Rename**.
5. In the **Name** column, type the text of the template name and then press `ENTER`.

Delete a task template

When you delete a task template, Perceptive Content removes the template from Management Console but retains all associated tasks. To delete a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click a task type.
4. In the **Templates** list, click a template and then click **Delete**.
5. In the **Task Template** dialog box, click **Yes**.

Configure task email notifications

To configure the options required for task creation email notifications, complete the following steps.

1. To add email addresses so that users can receive task creation notifications, perform the following substeps.
   1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
   2. In the left pane, select **Users.**
   3. In the right pane, on the **User Profiles** tab, select the user for whom you want to add an email address and then click **Modify**.

   4. In the **Modify User Profile** dialog box, in the left pane, select **Contact Information**.
   5. In the right pane, in the **Email** box, type the user's email address.
   6. Click **OK**.
   7. Define email addresses for all necessary users.
2. Optional. To include **Perceptive Content** links in task email notifications, perform the following substeps.
   1. On the **ImageNow Server** computer, navigate to the *[drive:]**inserver\etc*** folder.
   2. Open the *inserverNotification.ini* file in a text editor.
   3. In the Email section, configure the smtp.server setting.

      Example smtp.server=<SMTP server name or IP address>
   4. Configure the smtp.server.port setting.

      Example smtp.server.port=<Port number> By default, the port number is 25.
   5. Configure the smtp.from address.

      Example smtp.from=<From address for email notifications>
   6. Save and close the *inserverNotification.ini* file.
3. Optional. To include **WebNow** URL links in task creation email notifications, perform the following substeps.
   1. Verify the SMTP server settings are configured in the *inserverNotification.ini* file.
   2. On the **ImageNow Server** computer, navigate to the *[drive:]**inserver\etc*** folder and open the *inow.ini* file in a text editor.
   3. In the [**WebNow**] section, configure the webnow.url setting.

      Example webnow.url=http://<host name>/webnow/
   4. Save and close the *inow.ini* file.

Result All task templates use the same Perceptive Content and WebNow link settings.

Task Reasons

About managing task reason lists

Reasons provide users with pre-set descriptions that they can select to indicate why they are signing, completing, or returning a task.

A reason list is a set of reasons that you, the administrator, bundle as a list from which the user can select. There are two types of reasons and reason lists: Action and Return. While Return reasons are required for each task template type, Action reasons are optional for document deficiency and pointer task template types.

Manage reasons

You can create reasons and then group them together in reason lists. You can assign reasons and reason lists to tasks, workflow item holds, or digital signatures. To create, modify, or delete a reason, complete one of the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, complete one of the following steps.
   1. To manage reasons for tasks or workflow item holds, under **Select Department**, select a department from the list.
   2. To manage reasons for digital signatures, under **Select Department**, select **Cross Department Settings**.
3. In the left pane, click **Tasks**, **Workflow**, or **Digital Signatures**.
4. In the right pane, on the **Reason Lists** tab, select a reason list and click **Modify**.
5. In the **Reason List** dialog box, on the **List Members** tab, complete one of the following actions.

Situation	Steps
Create a reason	1. Click **New**. 2. In the **Reason** text box, type a name.
Modify a reason	1. Select a reason and click **Modify**. 2. In the **Reason** text box, type a new name.
Delete a reason	1. Select a reason and click **Delete**. 2. In the **Delete Reason** confirmation box, click **Yes**.

Result Changes you make to the available reasons apply to all departments.

Modify a reason list

Reason lists are used when you define action and return reasons in document deficiency and pointer task templates. To modify an reason list for a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Digital Signatures**.
3. In the right pane, on the **Reason Lists** tab, perform one of the following actions, depending on the situation.
4. Select the reason list and click **Modify**.
5. In the **Reason List** dialog box, on the **General** tab, change the name or description.
6. To enable or disable the list, clear or select the **Is active** check box.

7. On the **List Members** tab, in the **Selected** list, add, remove, or rearrange reasons.
8. Click **OK**.

Manage a reason list for a task template

Reason lists are used when you define action and return reasons in document deficiency and pointer task templates. To create, modify, or delete a reason list for a task template, complete one of the following procedures.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Reason Lists** tab, do one of the following actions, depending on the situation:

Situation	Steps
Create a reason list	1. Click **New**. 2. In the **Reason List** dialog box, on the **General** tab, type a name and optional description. 3. Verify that the **Is active** check box is selected to make the list available for assignment. 4. On the **List Members** tab, add, remove, or rearrange reasons. 5. Click **OK**.
Modify a reason list	1. Click **Modify**. 2. In the **Reason List** dialog box, on the **General** tab, modify the name or optional description. 3. To enable or disable the reason list, clear or select the **Is active** check box. 4. On the **List Members** tab, add, remove, or rearrange reasons. 5. Click **OK**.
Delete a reason list	1. Click **Delete**. 2. In the **Delete Reason List** confirmation box, click **Yes**.

Manage action reason lists for a signature required task template

To create, modify, or delete an action reason list for a signature-required task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, under **Select Department**, select **Cross Department Settings** from the list.
3. In the left pane, click **Digital Signatures**.
4. In the right pane, on the **Reason Lists** tab, perform one of the following actions, depending on the situation.

Situation	Steps
Create a reason list	1. Click **New**. 2. In the **Reason List** dialog box, on the **General** tab, type a name and optional description. 3. Verify that the **Is active** check box is selected to make the list available for assignment. 4. Optional. On the **List Members** tab, in the **Available** list, create, modify, or delete reasons. 5. On the **List Members** tab, in the **Selected** list, add, remove, or rearrange reasons. 6. Click **OK**.
Modify a reason list	1. Click **Modify**. 2. In the **Reason List** dialog box, on the **General** tab, change the name or description. 3. To enable or disable the list, clear or select the **Is active** check box. 4. Optional. On the **List Members** tab, in the **Available** list, create, modify, or delete reasons. 5. On the **List Members** tab, in the **Selected** list, add, remove, or rearrange reasons. 6. Click **OK**.
Delete a reason list	1. Select a reason list and click **Delete**.

Situation	Steps
	2. In the **Delete Reason List** confirmation box, click **Yes**.

Workflow

About administering workflow processes

Perceptive Content Workflow lets you automate business processes and create review checkpoints.

After you have saved a document, the document can be routed through any number of queues, which might represent different departments or different desks within a department.

You enter Workflow Designer to create or modify workflow processes. Other workflow administration tasks are done through Management Console, such as deleting workflow processes, assigning workflow privileges, and handling reason lists.

Create a workflow process

A workflow process contains a series of tasks and rules reflecting the review path a workflow item must take in order to meet the sign off and approval requirements of your work group. To create a workflow process, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **Workflow** tab, click **New**.
4. In the **Add Process** dialog box, type a name and an optional description.
   The description appears in the ToolTip for the process.
5. Click **OK**.

Next Create queues, routes, and rules to define the components in your new workflow process in Workflow Designer.

Modify a workflow process

To modify a workflow process, complete the following steps.

Prerequisite All other users must close the process.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **Workflow** tab, select a process and then click **Modify**.
4. When you are finished modifying your workflow process, close **Workflow Designer**.

Rename a workflow process

To change the name of a workflow process, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **Workflow** tab, select a process and then click **Rename**.
4. Enter a new name for your process.

Delete a workflow process

To delete a workflow process and remove all workflow items in its associated queues from workflow, complete the following steps.

Prerequisite All users must close the process before it can be deleted.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. On the **Workflow** tab, select a process and then click **Delete**.
4. In the **Delete Process** confirmation box, to remove items from the queues in this process and then delete the process, select the **Remove all items from workflow and then delete this process** check box and then click **Yes**.

Reasons

What is a reason list?

Reason lists provide users the ability to indicate why they are putting a workflow item on hold.

When putting an item on hold in a workflow queue, users are prompted to select a reason from a reason list. As manager of a workflow process, you control the contents of every On Hold reason list. You can define a reason list as part of a workflow queue's properties.

Add a reason list for putting an item on hold

When putting an item on hold in a workflow queue, the user must select the reason for the change from a reason list. To create and edit a reason list, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Create a hold reason list in Perceptive Content	1. In **Management Console**, in the left pane, under **Select Department**, select a

Situation	Steps
	department from the list. 2. In the left pane, click **Workflow**. 3. On the **Reason Lists** tab, click **New**.
Create a hold reason list in **Workflow Designer**	1. In **Workflow Designer**, double-click the queue. 2. In the **Queue Properties** dialog box, click **Reasons > New**.

2. In the **Reason List** dialog box, type a name and optional description for the reason list and then leave the **Is active** check box selected.
3. On the **List Members** tab, add, remove, and rearrange reasons as necessary.
4. Click **OK**.

Modify or rename a reason list for putting an item on hold

Reason lists are created to provide users with predefined reasons for putting workflow items on hold. To modify a reason list for putting an item on hold, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Modify a hold reason list in **Management Console**	1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list. 2. In the left pane, click **Workflow**. 3. Click the **Reason Lists** tab. 4. Click the list you want to change and then click **Modify**.
Modify a hold reason list in **Workflow Designer**	1. Double-click the queue. 2. In the **Queue Properties** dialog box, click **Reasons** in the left pane. 3. In the **Select a reason list to use when placing items On Hold in this queue** list, click the list you want to change and then click **Modify**.

2. In the **Reason List** dialog box, on the **General** tab, change the name and description if necessary.

> **Note:** You cannot change the name of a system list (Apply Signature, Void/Expire Digital ID, or Void Signature).

3. To make the reason list inactive, clear the **Is active** check box.

> **Note:** You cannot disable a system list.

4. In the **List Members** tab, add, remove, or rearrange reasons.
5. Click **OK**.

Delete a reason list for putting an item on hold

To delete a reason list for putting an item on hold, complete the following steps.

You cannot remove a system list (Apply Signature, Void/Expire Digital ID, or Void Signature).

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. Click the **Reason Lists** tab.
4. Click the reason list you want to delete and then click **Delete**.

Output Profiles

What is an output profile?

An output profile allows you to save output packaging configuration settings for reuse.

After you create an output profile, the system automatically sets the settings each time you select an output method and an associated profile. You can create, modify, and delete output profiles for all four output methods: email, fax, file, and print.

Although output packaging can handle large and complex output jobs, it is a client-side process designed for smaller, ad-hoc output jobs. Outputting a large job may take several minutes to complete. The system notifies you when the process starts and ends. Until then, you can continue to work in Perceptive Content.

For large and complex output jobs, consider using Output Agent, a server-side process that allows you to output items on a job-by-job basis or in a batch.

Create an email output profile overview

To create an output profile users can specify when emailing items, complete the following sequence of procedures.

1. Create an output profile.
2. Add a user or group to an output profile.
3. If emailing attachments, complete one of the following procedures.
   - Output items as a single PDF

- Output item as a multi-page TIFF

4. If emailing attachments: Define output content settings.
5. Activate an output profile.

Create a fax output profile overview

To create a fax output profile, complete the following sequence of procedures.

1. Create an output profile.
2. Add a user or group to an output profile.
3. Define fax output settings.
4. Define output content settings.
5. Define document type output order.
   This procedure only applies to documents.
6. Activate an output profile.

Create a file output profile overview

To create an output profile that allows users to export items to a file, complete the following sequence of procedures.

1. Create an output profile.
2. Add a user or group to an output profile.
3. Define file settings for an output profile.
4. Perform one of the following content options.
   - Output items as individual files.
   - Output item as a multipage tiff
   - Output items as a single PDF.
5. Optional. Create a folder hierarchy for output files.
6. Define output content settings.
7. Define document type output order.
   This procedure applies only to documents.
8. Activate an output profile.

Create a print output profile overview

To create a print output profile users can select when printing items, complete the following sequence of procedures.

1. Create an output profile.
2. Add a user or group to an output profile.
3. Define output content settings.
4. Define document type output order.

> **Note:** This procedure applies only to documents.

5. Activate an output profile.

Define page rotation for printing

To define whether the system automatically rotates a page image when the page orientation does not match the printer sheet orientation, complete the following steps.

1. In the imagenow.ini file under `[Printer]`, for the **printer.rotate.to.best.fit** setting, type one of the following options.
   - `TRUE` to rotate page images to match printer sheet orientation.
   - `FALSE` to maintain the page image during printing.

   The default setting is FALSE.
2. Save and close the file.

Copy an output profile

To copy an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles.**
2. In the right pane, click the appropriate output method tab.
3. Select the output profile and then click **Copy**.
4. In the **Output Profile** dialog box, in the **Name** field, type a name for the new profile, and then click **OK**.

Delete an output profile

To delete an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right, click the appropriate output method tab.
3. Select the output profile and then click **Delete**.
4. In the confirmation prompt, click **Yes**.

Modify an output profile

To modify settings of an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, click the appropriate output method tab.
3. Select the profile and then click **Modify**.
4. Modify the output profile settings.
5. Click **OK**.

Rename an output profile

To rename an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, click the appropriate output method tab.
3. Select the output profile and then click **Rename**.
4. Type the new name of your output profile and press `ENTER`.

Activate an output profile

To activate an output profile that can be selected when printing, emailing, exporting, or faxing an item, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, click the output method tab, select the output profile, and click **Modify**.
3. On the **General** tab, select **Is active**.
4. Click **OK**.

Define email settings for an output profile

To define the settings to use when emailing an item, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, click the **Email** tab, select the output profile, and click **Modify**.
3. On the **Output** tab, for **Email**, perform one of the following actions.
   - Type the email address where you want to send the output file.
   - Leave the box empty to select the email address from the address book of your email client.
4. In the **Method** list, select a method for sending the email.
5. If you select **Attachment**, under **Annotations**, for **Include**, select one of the following options.
   - **Annotations** to output the item with annotations.
   - **No annotations** to output the item without annotations.
   - **Current view** to output the current view of the item.
6. Click **OK**.

Define fax settings for an output profile

To define the fax number and cover page information to use when exporting an item to fax using an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, on the **Fax** tab, select the output profile you want to modify, and click **Modify**.
3. In the **Output Profile** dialog box, on the **Output** tab, under **General**, perform one of the following options.
   - If you have added fax numbers to your address book, select the number from the **Fax Number** list.

- If you are using a number that is not in your address book, enter the fax number to where you want to send the item.

4. Under **Cover Page**, perform any of the following actions to add content to the fax cover page.
   - In the **Attention** box, type the name of the recipient of the fax.
   - In the **Comments** box, type any additional information you want to include with the fax.
5. Under **Annotations**, for **Include**, select one of the following options.
   - **Annotations** to output the item with annotations.
   - **Current view** to output the current view of the item.
   - **No annotations** to output the item without annotations.
6. Click **OK**.

Define file settings for an output profile

To define the file format and location when exporting items to a file using an output profile, complete the following steps.

1. In **Management Console**, in the left pane, click **Output Profiles**.
2. In the right pane, on the **File** tab, select the output profile you want to modify, and click **Modify**.
3. In the **Output Profile** dialog box, on the **Output** tab, for **Format**, select an output format.
4. To set the output directory, next to **Location**, click **Browse** and choose a location to store the output files.

   Note:
   You must set a location. If you do not set one, the system prompts you with an error each time you try to use the profile.

5. Under **Annotations**, for **Include**, select one of the following options.
   - **Annotations** to output the item with annotations.
   - **Current view** to output the current view of the item.
   - **No annotations** to output the item without annotations.
6. Click **OK**.

Output file name variables

The following topic lists the variable text you can use when generating a custom file name to email an item as an attachment or export an item to a file.

Note:
You can only use these variables with the multi-page TIFF and Individual file export formats. The Single PDF file export does not support using these variables.

Guidelines

When entering variables, separate text with underscores and enclose variables with square brackets. The entire file path, which includes the file name and extension, cannot exceed the character limit of your operating system.

Variables

Variable	Description	Example
[DOCID]	The item ID	Document_[DOCID]
[DRAWER]	The item drawer value	[DOCID]_Account_[DRAWER]
[FIELD1]	The item Field1 value	[DOCID]_Account_[FIELD1]
[FIELD2]	The item Field2 value	[DOCID]_Patient_[FIELD2]
[FIELD3]	The item Field3 value	[DOCID]_Invoice_[FIELD3]
[FIELD4]	The item Field4 value	[DOCID]_Student_[FIELD4]
[FIELD5]	The item Field5 value	[DOCID]_Program_[FIELD5]
[DOCTYPE]	The item type	[DOCTYPE]_[DOCID]

Manage views

About administering views

As a department manager, you create views that display only the content with which your users need to work.

By tailoring your user's view to only the items they need to see, you simplify their user experience. While the system may contain hundreds or thousands of items and other types of content, your users see only the subset of items that you enable in their view. Views enable you to add another layer of protection to content. In addition to the access privileges set for drawers, file plans, and item types, your users can see the item within a particular drawer, file plan, or type that satisfies the view definition.

You can also use a view to create a report if you have Business Insight installed in your environment.

To view records functionality, you must install a Records Manager license.

About administering related views

A user can display one or more related views from a viewer in Perceptive Content or WebNow. When the user selects a related view to apply to the active document or folder, the Related Documents or Related Folders pane displays other items that match the items with respect to the conditions you define for the related view.

Users with document or folder view management privileges can create, rename, and delete related views in Perceptive Content. When you modify a related view, you automatically enter Perceptive Content View Designer, where you can create or modify relationship conditions, activate the view, and assign security settings to it.

Suppose, for example, you view a student information document with a Field2 value that contains the student's ID number. You want to see all the other documents with the same Field2 value. You can create the condition for this relationship, and the Related Documents pane displays any other documents that have a Field2 value that match the student ID number in the active document.

As another example, suppose you view an inventory document with a custom property that contains a check number. Another set of business documents contains a check number in Field3 rather than in a custom property. You want to see all documents with a Field3 value that matches the Check Number custom property in the active document. You can create the conditions for this relationship, and the Related Documents pane displays any other documents that have a Field3 value that matches the Check Number custom property in the active document.

For folders, related views are like related views for documents except that the relationship matches on folder properties. For example, suppose you work at a hospital and your Perceptive Content environment is set up so that each time a patient visits the hospital, a new folder is created. The new folder contains all documents related to that visit. If a patient makes a return visit, that patient will have two folders created, one for each visit. You view a recent patient's visit and realize you need to see all other folders from past visits. You can create the conditions for this relationship, view all folders that correspond to the patient's identification code, and open any folders that you need to view.

Types of views

The following list summarizes views available in Perceptive Content, including views created by you, your view manager, and views created automatically by the Perceptive Content system.

Application Plan

An application plan view returns a set of documents captured using a specific application plan. Application plans that do not have a defined view action do not display results.

Modifiable components

View conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with application plan management privileges can modify application plan views, including view actions and components, in Application Plan Designer.

Users with the View privilege for the application plan can run the view. For the active business application plan screen, the view returns the associated results.

Batches

A batch view returns the batches in your Perceptive Content system. By default, batch users can see all batches, batches that are ready for QA, and batches that are ready for linking.

Modifiable components

Column layout

Sorting and grouping

Document

A document view returns a set of documents. Document views appear in the Views pane under Documents.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a document view.

File Plans

A file plan view returns a set of records within a particular record category or record folder. File plan views appear in the Views pane under File Plans, and are organized according to the hierarchy of file plans, record categories, and record folders in the system. When you select one of these items, Perceptive Content retrieves the set of records within that item.

ImageNowExplorer uses the system-defined view and it cannot be modified. You can modify a view during a viewing session, but you can’t create and save filters or views for file plan view.

File plan view does not use Quick Search, only Advanced Search.

Modifiable components

View conditions

Column layout

Sorting and grouping

Security considerations

In the views tree, users see only the file plans for which they have been granted Search privileges, and the record categories and record folders for which they have been granted Use privileges.

Folder

A folder view returns a set of folders. Folder views appear in the Views pane under Folders.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a folder view.

Folder content

When the user opens a folder, Folder Viewer displays a secondary grid that lists the folder's contents. This secondary grid is called a folder content view. Because document and folder shortcuts can belong to any number of folders, the same document or folder might appear as a representation in Folder Viewer with different grid layouts, depending on the type of folder the user opens.

Changes you make apply to all folders associated with the modified folder type. Because you can represent a document or folder using shortcuts in any number of folders, the same item might appear in a folder content view with different grid layouts, depending on the folder's type.

Modifiable conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with folder type management privileges can modify components of the folder content view in Management Console.

Recently received documents

Recently received documents appear in a temporary view that appears when one Perceptive Content user transfers documents to another user with the Send to User feature. This transfer must occur while both users are connected to the same ImageNow Server. The view sorts the received documents according to the name of the sending user and the time they were sent.

Record

To view records functionality, you must install a Records Manager license.

A record view returns a set of records. Record views appear in ImageNowExplorer, in the Views pane under Records.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a record view.

Record Folder

A record folder view returns a set of record folders and record categories. Record Folders views appear in ImageNowExplorer, in the Views pane under Record Folders.

Modifiable conditions

View name

- View privileges
- View conditions
- Public filters
- Private filters
- Column layout
- View statistics
- Sorting and grouping

Security considerations

Users with view access can run a record folder view.

Record Folder Content

When the user opens a record folder, Record Folder Viewer displays a secondary grid that lists the folder's contents. This secondary grid is called a record folder content view. Because record folder shortcuts can belong to any number of record folders, the same record folder might appear as a representation in Record Folder Viewer with different grid layouts, depending on the type of record folder the user opens. Changes you make apply to all record folders associated with the modified record folder type.

Modifiable conditions

- Column layout
- View statistics
- Sorting and grouping

Security considerations

Users with record folder management privileges can modify components of the record folder content view in Management Console.

Recycled documents and document folders

When the user deletes a document or folder, Perceptive Content moves the item to a system view called My Recycled Documents or My Recycled Folders.

Items remain in the recycled view for the number of days that you specify in the *inserverFS.ini* file.

Modifiable conditions

- Private filters

Security considerations

If the user is a Department Manager, two additional views appear. These views, All Recycled Documents and All Recycled Folders, display all items deleted by all users. As long as the user can see a recycled document or folder, the user can restore it to its previous state, at which time the document or folder keeps the attributes it had before deletion, if possible.

Related

Related views appear in the Related Documents pane of the document viewer and in the Related Folders pane of the folder viewer. A related view applies the relationship selected in the list to the current document or folder. The view displays a list of all documents or folders that satisfy the conditions of the relationship.

Modifiable conditions

Relationship name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with document view management privileges can create and modify document relationships in Management Console. Users with folder view management privileges can create and modify folder relationships in Management Console.

Task

A task view returns a list of tasks assigned to the user according to the type of task, such as My Assigned or To Review. Task views appear in the Views pane under Tasks.

Modifiable conditions

Public filters

Private filters

View statistics

Column layout

Sorting and grouping

Workflow process

A workflow process view returns a list of items (representing documents or folders) when the user accesses a workflow process, which appears in the Views pane under Workflow.

Modifiable conditions

Private filters

Security considerations

Workflow process views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

Security considerations

Users with view access can run a folder view.

Workflow queue

A workflow queue view returns a list of items (representing documents or folders) when the user accesses a workflow queue, which appears in the Views pane under Workflow.

Modifiable conditions

Column layout

View statistics

Private filters

Grouping and sorting

Security considerations

Workflow queue views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

Supported file formats for Perceptive Content

The following tables list the file formats that ImageNowViewer and WebNowViewer support.

Archive file formats

Format	Version	Extension
7-Zip	4.57	7Z

Format	Version	Extension
BinHex	N/A	HQX
GZIP	2	GZ
Java Archive	N/A	JAR
Microsoft Cabinet Format	1.3	CAB
Microsoft Compressed Folder	N/A	LZH, LHA
PKZIP	Through 9.0	ZIP
RAR Archive	2.0 through 3.5	RAR
Tape Archive	N/A	TAR
Unix Compress	N/A	Z
UUEncoding	All versions	UUE
WinZip	Through 10	ZIP

Binary file formats

Format	Version	Extension
Executable	N/A	EXE
Link Library	N/A	DLL

Database file formats

Format	Version	Extension
Microsoft Access	95, 97, 2000, 2002, 2003	MDB

Display file formats

Format	Version	Extension
Adobe PDF	Through 9	PDF

Graphic file formats

Format	Version	Extension
Computer Graphics Metafile	N/A	CGM
CorelDRAW	Through 9.0	CDR
DCX Fax System	N/A	DCX
Digital Imaging and Communications in Medicine	N/A	DCM
Encapsulated PostScript (raster)	TIFF header	EPS
Enhanced Metafile	N/A	EMF
GIF	87, 89	GIF
JPEG	N/A	JPEG, JPG
Lotus AMIDraw Graphics	N/A	SDW
Lotus Pic	N/A	PIC
Macintosh Raster	2	PIC, PCT
MacPaint	N/A	PNTG
Microsoft Office Drawing	N/A	MSO
PC PaintBrush	3	PCX
Portable Network Graphics	N/A	PNG
Sun Raster Image	N/A	RS

Format	Version	Extension
Tagged Image File	Through 6.0.3	TIFF
Truevision Targa	2	TGA
Windows Animated Cursor	N/A	ANI
Windows Bitmap	N/A	BMP
Windows Icon Cursor	N/A	ICO
Windows Metafile	3	WMF
WordPerfect Graphics 1	1	WPG
WordPerfect Graphics 2	2, 7	WPG

Mail file formats

Format	Version	Extension
Lotus Notes database	4, 5, 6.0, 6.5	NSF
Microsoft Outlook	97, 2000, 2002, 2003	MSG
Microsoft Outlook Personal Folder	97, 2000, 2002, 2003	PST

Multimedia file formats

Any audio or movie format supported by Apple QuickTime or Windows Media Player. For specific formats supported by these players, refer to the respective Apple or Microsoft websites. Depending on your hardware and network, large movie files (over 100 MB) may slow performance.

Presentation file formats

Format	Version	Extension
Applix Presents	4.0, 4.2, 4.3, 4.4	AG
Corel Presentations	6, 7, 8, 9, 10, 11, 12, X3	SHW

Format	Version	Extension
Lotus Freelance Graphics 2	2	PRE
Lotus Freelance Graphics	96, 97, 98, R9, 9.8	PRZ
Microsoft PowerPoint Macintosh	98, 2001, 2004	PPT, PPS, POT
Microsoft PowerPoint PC	4	PPT, PPS, POT, PPTX, PPTM, POTX, POTM, PPSX, PPSM
Microsoft PowerPoint Windows	95, 97, 2000, 2002, 2003, 2007	PPT, PPTM, PPTX

Spreadsheet file formats

Format	Version	Extension
Applix Spreadsheets	4.2, 4.3, 4.4	AS
Comma Separated Values	N/A	CSV
Corel Quattro Pro	5, 6, 7, 8	WB2, WB3
Lotus 1-2-3	96, 97, R9, 9.8	123
Lotus 1-2-3	2, 3, 4, 5	WK4
Lotus 1-2-3 Charts	2, 3, 4, 5	123
Microsoft Excel Charts	2, 3, 4, 5, 6, 7	XLS
Microsoft Excel Windows	2.2 through 2007	XLS, XLSM, XLSX, XLW, XLT, XLA, XLTX, XLTM, XLAM
Microsoft Excel Macintosh	98, 2001, v.X, 2004	XLS
Microsoft Works Spreadsheet	1, 2, 3, 4	S30, S40
OASIS Open Document Format	1, 2[3]	ODS, SXC, STC
OpenOffice Calc	1, 1.1	SXC, ODS, OTS
StarOffice Calc	6, 7	SXC, ODS

Text and Markup file formats

Format	Version	Extension
ANSI	N/A	TXT
ASCII	N/A	TXT
HTML	3, 4	HTM
Microsoft Excel Windows XML	2003	XML
Microsoft Word Windows XML	2003	XML
Rich Text Format	1 through 1.7	RTF
Unicode Text **Note:** Specific support is only applicable to the Unicode version.	3, 4	TXT
UTF-8	N/A	TXT
UTF-8 - No Byte Order Mark (BOM)	N/A	TXT
UTF-16 Little Endian (UTF-16LE) **Note:** A BOM is required for the UTF-16LE format to be read correctly.	N/A	TXT
XHTML	1	HTM, XHTML
XML	1.0	XML

Word processing file formats

Format	Version	Extension
Adobe FrameMaker Interchange	5, 5.5, 6, 7	MIF

Format	Version	Extension
Format		
Applix Words	3.11, 4, 4.1, 4.2, 4.3, 4.4	AW
Corel WordPerfect Linux	6.0, 8.1	WPS
Corel WordPerfect Macintosh	1.02, 2, 2.1, 2.2, 3, 3.1	WPS
Corel WordPerfect Windows	5, 5.1	WO, WPS
Corel WordPerfect Windows	6, 7, 8, 9, 10, 11, 12, X3	WPD
DisplayWrite	4	IP
Folio Flat File	3.1	FFF
Fujitsu Oasys	7	OA2
IBM DCA/RFT (Revisable Form Text)	SC23-0758 -1	DC
JustSystems Ichitaro	8 through 2005	JTD
Lotus AMI Pro	2, 3	SAM
Lotus AMI Professional Write Plus	2.1	AMI
Lotus Word Pro	96, 97, R9	LWP
Lotus SmartMaster	96, 97	MWP
Microsoft Word PC	4, 5, 5.5, 6	DOC
Microsoft Word Windows	1.0, 2.0, 6, 7, 8, 95, 97, 2000, 2002, 2003, 2007	DOC, DOCX, DOCM, DOT, DOTX, DOTM
Microsoft Word Macintosh	4, 5, 6, 98, 2001, v.X, 2004	DOC, DOT
Microsoft Works	1, 2, 3, 4, 6, 2000	WPS
Microsoft Windows Write	1, 2, 3	WRI

Format	Version	Extension
OASIS Open Document Format	1, 2[3]	ODT, SXW, STW
Wordpad	Through 2003	RTF
XyWrite	4.12	XY4

Supported file formats for WebNow

The following list describes the file formats you can view in WebNow.

Image files

Supported extensions include: TIFF, JPG, PNG, GIF, and BMP files.

PDF files

If the native-viewer setting in your *WebNow.settings* file is set to enabled, you can view PDF files.

HTM and HTML files

You can view HTM and HTML, version 3.2 or earlier.

Other files

You can view other file types such as text files in WebNowby adding the file extensions to the text-extensions setting in the *WebNow.settings* file. To view Office files, launch the associated application from the WebNowViewerwhen prompted.

Multimedia formats

If the native-viewer setting in your *WebNow.settings* file is set to enabled, you can view multimedia files. You can view audio and movie formats supported by Apple Quicktime or Windows Media Player. For specific formats supported by these players, refer to the respective Apple or Microsoft web sites. Depending on your hardware and network, large movie files (over 100 MB) may slow performance.

Work with Views

Create a view

To create a new view, complete the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, click the appropriate tab, and then click **New**.
3. In the **New View** dialog box, define a name and description for this view and click **OK**.

Next Modify the view in View DesignerManagement Console to define conditions, column layout, filters, and view security.

Create a related view

To create a relationship view for an item, perform the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, on the **Related** tab, click **New**.
3. In the **New Relationship** dialog box, type a name and an optional description of the view that appears in the Tool Tip for the view, and then click **OK**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Copy a view

You can copy a view to create a new view with the same conditions, filters, column layout, and security settings. To copy a view, perform the following steps.

You cannot copy a task view.

1. In **Management Console**, in the left pane, click **Views**.
2. On the appropriate tab, select the view definition and click **Copy**.

   To view records functionality, you must install a Records Manager license.
3. In the **Copy View** dialog box, type a name and optional description for the new view.
4. Optional. To copy public filters associated with the original view definition, select the **All public filters** check box.
5. Optional. To copy users and the view privileges associated with the original view definition, select the **All users and their privileges** check box.
6. Optional. If you included users and you also want to copy any private filters created by those users, select the **Private filter for users** check box.
7. Click **OK**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Copy a related view

To copy a relationship view for an item, complete the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related** tab.
3. Select the relationship and click **Copy**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Delete a view

To delete a view, perform the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. On the **Document**, **Folder**, **Record**, or **Record Folder** tab, select the view and click **Delete**.

   To view records functionality, you must install a Records Manager license.

3. In the confirmation dialog, click **Yes**.

   Result Users will not see the view removed until they log out and log in again.

Delete a related view

To delete a relationship view for a document, complete the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related** tab.
3. Select the relationship and click **Delete**.
4. In the confirmation dialog box, click **Yes**.

Rename a view

To rename a view, complete the following steps.

You can also rename a view by editing its properties in View Designer. You cannot rename a task view.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the appropriate tab, select the view you want to rename and click **Rename**.
3. In the **Rename View** dialog box, type the new view name and an optional description.
4. Click **OK**.

Rename a related view

To rename a relationship view for documents or folders, complete the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related Documents** or **Related Folders** tab.
3. Select the relationship and click **Rename**.
4. In the **Rename Relationship** dialog box, type the new name of the relationship in the **Name** box.

Modify a view

To modify components of a view, complete the following steps.

Prerequisite It is recommended that you perform view modifications when no users are signed in to Perceptive Content.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the appropriate tab, select the view you want to change and click **Modify**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Modify a related view

To modify a relationship view for an item, complete the following steps.

Prerequisite It is recommended that you perform view modifications when no users are signed in to Perceptive Content.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related** tab.
3. Select the relationship and click **Modify**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Version control status indicators

Any document added to version control, either in its current version or in a previous version, is accompanied by a status indicator in the document search results grid, in the Version Controlled column. If your view does not show this column, you can temporarily display it or you can add the column in a private filter.

None

The document is not version controlled.

Checked In

The document is version controlled but not currently checked out to any users.

Checked Out

This document is version controlled and currently checked out by another user.

Checked Out by You

This document is version controlled and currently checked out by you.

If a document is checked in, but marked private by another user, the Is Private icon appears in the Is Private column in the document search results grid.

Configure recycle bin views

You can determine the amount of time an item appears in the recycle bin views in ImageNowExplorer and WebNowExplorer before permanently deleting it. To configure recycle bin views, complete the following steps.

The following recycle bin views are available to configure: My Recycled Documents, My Recycled Folders, All Recycled Documents, and All Recycled Folders.

1. Open the *[drive:]***\inserver\etc***\inserverFS.ini* file with a text editor.
2. To determine the number of days you want items to remain in the recycled views before they are permanently removed from **ImageNow Server**, under **[General]**, perform one of the following actions for the *destruction.wait.time* setting.
   - To immediately delete items from the recycle bin, enter `0`.
   - To delete items from the recycle bin after a specific number of days, enter the number of days.

   > **Note:** You cannot enter a negative integer. The maximum number of days you can retain items in a recycle bin view is 2,147,483,647.

3. Save and close the *inserverFS.ini* file.
4. Restart the **File System Agent** service.

Define default views for a user

You can define the view WebNow uses if a user accesses a view but does not specify the view name in the URL. To define default views for a user, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. Select **Users**.
3. In the right pane, select the user for whom you want to define default views, then click **Modify**.
4. In the **Modify User Profile - <*user name*> - <*department name*>** dialog box, in the left pane, click **Default Views**.
5. In the right pane, select the default views you want to specify and click **Apply**.

   > **Note:** If you cannot select a view from the displayed list, the view has been shared with you by the department that manages it but you cannot modify the default view.

   > **Note:**

   If you do not see views in the list, the current view has not been shared with you.
6. Click **OK** to return to **Management Console**.

Set the system default view

You can set the system-wide default view to use a link that does not specify which view to use, and the user does not have a default view configured. To set the system default view, complete the following steps. You must be a department manager to set the default system view.

You can also set the default view on a per-user basis in Management Console.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, select **Views**.
3. In the right pane, select the **System Defaults** tab.
4. In the **Document view** list, select a default document view.
5. In the confirmation prompt, click **Yes**.

   Note: Select **None** from the list to remove the default document view.

6. In the **Folder view** list, select a default folder view.
7. In the confirmation prompt, click **Yes**.

   Note: Select **None** from the list to remove the default folder view.

Folder content search conditions

When you display the Search pane on the Content tab of Folder Viewer, several conditions are available. The Add Condition dialog box allows you to build a search using a combination of constraints, fields, operators, and values described in the following table.

If you are performing a variable search, you can select one of the following values to use as a variable for the current user: user name, first name, last name, title, organization, organization unit, locality, or user ID. You can also use the current date and time as a variable.

Composite property

The Composite property constraint allows the following operators: is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank is one of, is not one of, is between, and is not between.

The composite properties, which can contain all possible values, are defined by your administrator.

You can select a composite property is the Composite list, or you can select a custom property in the Field list.

Custom property

The Custom property constraint allows the following operators: is equal to, is not equal to, is less than, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between, is equal to, is not equal to

Constraint	Operators	Field	Field Description	Possible Values
Composite property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	In the Composite list, select a composite property. In the Field list, select a custom property.	Composite properties are defined by your administrator.	All defined composite properties
Content property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	Content type	The type of content in the folder.	• Document • Document Shortcut Folder • Folder Shortcut

Constraint	Operators	Field	Field Description	Possible Values
Added to folder within (days)	The number of days within which the document, folder, or shortcut was added or moved to the folder.	Type any positive integer.		
Created within (days)	The number of days within which the document, folder, shortcut was created.	Type any positive integer.		
Name	The name value of the document, folder, or shortcut.	Type any alphanumeric value.		
Drawer	The drawer value associated with the document, folder, or item referenced by a shortcut.	Type any alphanumeric value.		
Document ID	The unique ID of the document.	Type any alphanumeric value.		
Field1	The Field1 value associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field2	The Field2 value associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		

Constraint	Operators	Field	Field Description	Possible Values
Field3	The Field3 value associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field4	The Field4 associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field5	The Field5 associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Document type	The document type associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Folder ID	The unique ID of the folder.	Type any alphanumeric value.		
Folder type	The folder type associated with the folder or folder referenced by a shortcut.	Type any alphanumeric value.		
Custom property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is	Select a custom property.	Custom properties are defined by your administrator.	All defined custom properties

Constraint	Operators	Field	Field Description	Possible Values
	greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between			
Date	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, is one of, is not one of, is between, is not between	Added to folder	The date the content was added or moved to the folder.	Type or select a date value.
Checked out	The date the document or document referenced by a shortcut was checked out in version control.	Type or select a date value.		
Created	The date the document, folder, or shortcut was created.	Type or select a date value.		
Last viewed	The date the content was last viewed by a user.	Type or select a date value.		
Modified	The date the document, folder,	Type or select a date value.		

Constraint	Operators	Field	Field Description	Possible Values
	or shortcut was last modified.			
Status changed	The date the folder's active or inactive status changed.	Type or select a date value.		
Document Status	is equal to, is not equal to	Digital signature status	The status of the version controlled digital signature of the document.	Valid, Invalid, Void, Not Signed
Has hold applied	Whether the document has a direct or inherited retention hold applied.	Yes, No		
Has physical reference	Whether the document had a physical file reference.	Yes, No		
Is private	Whether the document is marked private in version control.	Yes, No		
Is version controlled	Whether the document is added to version control.	Yes, No		
Folder Status	is equal to, is not equal to	Folder status	The active or inactive status of the folder.	Active, Inactive
Has required documents	Whether the folder has required document types.	Yes, No		
Physical property	is equal to	In the Template	Physical file	Template: All

Constraint	Operators	Field	Field Description	Possible Values
	is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	list, select a physical file template. In the Field list, select a physical property.	templates and physical properties are defined by your administrator.	physical file templates the user can access, Field: All physical properties associated with the template
User	is equal to, is not equal to, starts with, does not start with, ends with, is blank, is not blank, is one of, is not one of	Checked out by	The user who has the document checked out in version control.	Type an alphanumeric value. Any valid user name.
Created by	The user who created the document, folder, or shortcut.			
Last viewed by	The user who last viewed the document, folder, or item referenced by a shortcut.			
Modified by	The user who last modified the document, folder, or shortcut.			
Private by	The user who marked the			

Constraint	Operators	Field	Field Description	Possible Values
	document private in version control.			
Status changed by	The user who last changed the folder status.			
Workflow item property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	Is in workflow	Whether the document or folder is added to workflow.	Yes, No
Workflow queue	The workflow queue associated with the document, folder, or item referenced by a shortcut.	Type an alphanumeric value.		
Workflow item user	The user who added the document, folder, or item referenced by a shortcut to workflow.	Type an alphanumeric value. Any valid user name.		
Workflow item status	The status of the document, folder, or item referenced by a shortcut in workflow.	Idle, Working, On hold, Pending, Waiting for routing, Waiting for inbound action		

Sort view or search results

You can sort the rows in the results grid for a view or public filter. To sort view results, complete the following steps.

1. In the view preview or search results grid, to sort by a single column, right-click the column heading and then do one of the following:
   - To sort the results in ascending order, select **Sort Ascending**.
   - To sort the results in descending order, select **Sort Descending**.
2. To sort by additional columns, hold the `SHIFT` key and click the column heading once to sort the results in ascending order or twice to sort the results in descending order.

   Note: To sort on multiple columns, you must group the results.
3. Optional. To remove all sorting, right-click a column heading and select **Reset sort order**.
4. Save the view or filter to preserve the sort order.

Select columns to display

To show or hide columns in a view or public filter, complete the following steps.

1. In **View Designer**, in the **Preview** pane, click the **Columns** button.
2. In the **Columns** dialog box, do the following substeps:
   1. For the column or columns you want to hide, clear the check box. To hide all columns, right-click anywhere in the dialog box and then click **Clear All**.
   2. For the column or columns you want to show, select the check box. To show all columns, right-click anywhere inside the dialog box and then click **Select All**.
   3. Click **OK**.
3. In the **Designer** toolbar, click the **Save** button.

Group view or search results

You can group the results of a view, filter, or search by one or more columns into groups you can expand and collapse. To group view results, complete the following steps.

1. In the search results grid or view preview grid, right-click a column heading, and then click **Group by this Column**.

   Groups are initially collapsed when the view or filter runs.
2. Optional. To create a subgroup under the grouped column, right-click a column heading, and then click **Group by this Column**.
3. Optional. To expand the grouped results, right-click a column headings, and then click **Expand All Groups**.
4. Save the view or filter to preserve the column grouping.

About viewing batches by batch user

A user can view batches captured by batch users, and can be limited to viewing batches captured only by specific batch users.

Users can capture batches with the **Global > Capture > Batch Mode** privilege and then view those batches.

If you want a user to view batches captured by any other batch users, you must give the user the **Drawer > Batch (Proposed Key) > Process** privilege for each drawer.

If you want to limit a user to viewing batches captured only by specific batch users, you must also enable filtering by batch user. When you enable filtering by batch user, you create a list of only those batch users whose batches you want the user to view.

Add a custom property column

To add columns to display custom property values for content, complete the following steps.

1. Access the view using one of the following methods:

Situation	Steps
Add a custom property column for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. In **Workflow Designer**, open the desired queue. 3. In the **Queue Properties** dialog box, click **Appearance**. 4. In the right pane, click **Preview**.
Add a custom property column for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Add a custom property column for a folder content view	1. In **Management Console**, in the left pane, click **Folder Types**. 2. In the right pane, on the **Folder Types** tab, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click **Preview**.

2. In the **View Preview** window, click the **Columns** button.
3. In the **Columns** dialog box, click **Add**.
4. In the **Custom Property** dialog box, select the **Filter by** list and do one of the following actions:
   - To display a custom property based on item type, select **Document Types**.

- To display a custom property based on folder type, select **Folder Types**.
- To display all custom properties, select **All Custom Properties**.

5. In the **Type** list, select a custom property.

   The **Type** list options change based on the **Filter by** option selected.
6. Select a custom property and click **Add**.
7. Click **OK**.

Enable filtering by batch user for a group

A group can view batches captured by batch users if granted the appropriate drawer privileges for the drawers for which the batches are targeted. To further limit groups to viewing only batches captured by specific batch users, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select **Cross Department Settings** from the list.
2. In the left pane, click **Groups.**
3. In the right pane, select the group you want and click **Modify**.
4. In the **Modify Group Profile** dialog box, in the left pane, click **Batch Users**.
5. Select **Enable filtering by batch user**.
6. To add batch users to the list, complete the following substeps.
   1. Click **Add**.
   2. In the **Select Users** dialog box, under **Available Users**, select a user and click **Add**.
   3. Click **OK** when you finish adding batch users.
7. Optional. To remove batch users from the list, complete the following substeps.
   1. Click the batch user.
   2. Click **Remove**.

Enable filtering by batch user for a user

A user can view batches captured by batch users if granted the appropriate drawer privileges for the drawers for which the batches are targeted. To further limit users to viewing only batches captured by specific batch users, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select **Cross Department Settings** from the list.
2. In the left pane, click **Users.**
3. In the right pane, select the user you want and click **Modify**.
4. In the **Modify User Profile** dialog box, in the left pane, click **Batch Users**.
5. Select **Enable filtering by batch user**.
6. To add batch users to the list, complete the following substeps.
   1. Click **Add**.
   2. In the **Select Users** dialog box, under **Search**, select a user and click **Add**.

   3. Click **OK** when you finish adding batch users.
7. Optional. To remove batch users from the list, complete the following substeps.
   1. Click the batch user.
   2. Click **Remove**.

Add a custom property column for records

To add a custom property column for a record content view, complete the following steps.

1. In **Management Console**, in the left pane, click **Records** and select **Record Folder Types** or **Record Category Types**.
2. In the right pane, on the **Record Folder Types** or **Record Category Types** tab, select the folder type and click **Modify**.
3. In the dialog box, on the **Appearance** tab, click **Preview**.
4. In the **View Preview** window, click the **Columns** button.
5. In the **Columns** dialog box, click **Add**.
6. In the **Custom Property** dialog box, select the **Filter by** list and do one of the following actions:
   - To display a custom property based on record type, select **Record Types**.
   - To display a custom property based on record folder type, select **Record Folder Types**.
   - To display all custom properties, select **All Custom Properties**.
7. In the **Type** list, select a record or record folder type.

   The **Type** list options change based on the **Filter by** option selected.
8. Select a custom property and click **Add**.
9. Click **OK**.

Statistics

What are statistics?

Statistics are calculations such as the maximum, minimum, and average of all the values in a specific column that appear in the search results for the view.

You can define statistics for any document view, folder view, task view, record view, or record folder view for which you have management privileges. You cannot define statistics for a public filter or a related view.

For any folder type for which you have management privileges, you can create a view that determines the appearance of the folder content results in Folder Viewer. You can also create a statistic for a workflow view, which defines the appearance when viewing the contents of a workflow queue. When you define a set of statistics for a folder content or workflow view, the statistics appear in a pane below the search results grid. In the statistics pane, you can view the statistics, highlight the search results in the grid that apply to the statistic, and, if only one document or folder matches the statistic value, open the document or folder.

The following examples demonstrate some ways you can use view statistics.

Accounts Payable: Theresa is an Accounts Payable administrator who wants to quickly view the total of all the invoices in her "OpenInvoices" view. This view contains a custom property column which stores the invoice amount for each document. Because it is a numeric custom property, Theresa adds a Sum statistic on this custom property column named "Total open amount". Every time she runs a search using this view, she sees the total invoice amount of all the documents returned by the search in the statistics pane.

Admissions: Sam is an Admissions director who wants to view the average ACT score of the students who applied to his university in the current academic year. His student folder view contains a custom property column which stores the ACT score for each student and a date range that spans the current academic year. Because the view uses a numeric custom property, Sam adds an Average statistic on this custom property column named "Average ACT."

Healthcare: Dr. Lovelace wants to quickly view the next task he is responsible for in his folder view that lists all his patients with document deficiencies. His view administrator adds a Next statistic to the task due date column in the view. When Dr. Lovelace logs in, he can quickly see the date the next task is due, highlight the document associated with the task, and open it in ImageNowViewer.

To view records functionality, you must install a Records Manager license.

Data types for statistical functions

The statistical functions you can define depend on the data type of the column values. To add a statistic for a custom property column, you must first add the custom property column to the view. The following statistics are available for the specified data types.

Statistical functions

Average

This function calculates the average of the column values.

Column value data type

Numeric

Sample columns

Summary Task Count

<Number custom property>

Count

This function counts the number of values in the search results grid that match the selected variable (you must select a variable for this statistical function).

Column value data type

String, list, flag

Sample columns

Folder Name

In Workflow

<List custom property>

<String custom property>

<Flag custom property>

Count Future

This function counts the number of the column's date values that occur in the future.

Column value data type

Date

Sample columns

Next Task Due

Due Date

<Date custom property>

Count Past

This function counts the number of the column's date values that occur in the past.

Column value data type

Date

Sample columns

Created

Last Viewed

<Date custom property>

First

This function distinguishes the earliest date in the column's search results.

Column value data type

Date

Sample columns

Modified

Checked Out

<Date custom property>

Last

This function distinguishes the latest date in the column's search results.

Column value data type

Date

Sample columns

Checked In

Assigned

<Date custom property>

Maximum

This function distinguishes the largest numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Pages

<Number custom property>

Median

The function distinguishes the middle value in the column's search results.

Column value data type

Sample columns

Current Version

<Number custom property>

Minimum

This function distinguishes the smallest numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Days Until Due

<Number custom property>

Mode

This function distinguishes the most frequently occurring numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Summary Task Count

<Number custom property>

Next

This function distinguishes the next sequential date value in the column's search results.

Column value data type

Date

Sample columns

Status Changed

<Date custom property>

Previous

This function distinguishes the previous sequential date value in the column's search results.

Column value data type

Date

Sample columns

Completed

<Date custom property>

Sum

This function calculates the total of the values in the column's search results.

Column value data type

Numeric

Sample columns

Pages

<*Number custom property*>

Add view statistics overview

The configuration of a view statistic differs based on the data value type you select. You can create statistics for document, folder, folder content, record, task, and workflow views. To create a statistic for a view, complete any of the following procedures.

- Add a statistic for a date value.
- Add a statistic for a flag value.
- Add a statistic for a list value.
- Add a statistic for a numeric value.
- Add a statistic for a string value.

Add a statistic for a date value

You can display the newest, oldest, or next date value in a list of search results, or display the total number of dates in the past or dates in the future. To add a statistic for a date value, complete the following steps.

Prerequisite Before you can add a statistic for a date custom property value, you must first add the custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to view the next task due date, type `Next task due`.
5. Under **Column**, select the view column with the date values.
6. Under **Function**, select one of the following options depending on the display variable you want to show:

Situation	Steps
Total number of dates in the future	• Select **Count Future**.
Total number of dates in the past	• Select **Count past**.

Situation	Steps
Oldest date value	• Select **First**.
Newest date value	• Select **Last**.
The next future date	• Select **Next**.
The most recent date	• Select **Previous**.

7. Optional. Under **Caption**, select the value to display when the statistic only applies to one search result.

   Example If a **Previous** statistic shows the last viewed item, and you want to quickly display the user name of the user who viewed the item, you can use the **Caption** column to select the **Last Viewed By** user.

8. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
9. Click **OK**.

   The statistic appears below the grid in the **Preview** pane.
10. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a flag value

You can add a statistic that distinguishes the number of search results that have a true or false (boolean) value. To add a statistic for a flag value, complete the following steps.

Prerequisite Before you can add a statistic for a flag custom property value, you must add the flag custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to count the number of documents or records assigned to a retention policy, type `Documents in Retention` or `Records in Retention`.

5. Under **Column**, select the view column with the flag values.
6. Under **Function**, select **Count**.
7. Under **Variable**, select whether you want to count the results that meet the TRUE condition or the FALSE condition.
8. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

Example If there is one version-controlled item in your search results, and you want to quickly display the user who marked the item private, you can use the **Caption** column to select the **Private By** user.

9. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
10. Click **OK**.

    The statistic appears below the grid in the **Preview** pane.
11. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a list value

You can add a Count statistic that distinguishes a unique value of a list custom property. To add a statistic for a list value, complete the following steps.

Prerequisite Before you can add a statistic for a list value, you must first add the list custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

    Example If you have a list custom property to select the fiscal quarter associated with an invoice and you want to add a statistic to show fourth quarter invoices, type `Invoices in Q4`.
5. Under **Column**, select the list custom property.
6. Under **Function**, select **Count**.

    Note: Count is the only statistical function for list values.
7. In the **Variable** list, select an item from the list to use for the statistic.
8. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

    Example If there is only one item added to workflow during the month of January, and you want to quickly display the user who added the item to workflow, you can use the **Caption** column to select the workflow user.
9. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
10. Click **OK**.

    The statistic appears below the grid in the **Preview** pane.
11. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a numeric value

You can display the average, sum, median, or mode statistic that distinguishes numeric values, such as the number of tasks or a custom property that stores an amount value. To add a statistic for a numeric value, perform the following steps.

Prerequisite Before you can add a statistic for a flag custom property value, you must add the flag custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to view the average amount of invoices, type `Average invoice amount`.
5. Under **Column**, select the view column with the flag values.
6. Under **Function**, select the display variable you want to show.
7. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

   Example If a **Maximum** statistic displays the invoice with the highest amount, and you want to quickly display the user name of the user who last viewed the invoice, you can use the **Caption** column to select the **Last Viewed By** user.
8. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
9. Click **OK**.

   The statistic appears below the grid in the **Preview** pane.
10. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a string value

You can add a non-case sensitive Count statistic that distinguishes string values, such as a task template or drawer name. To add a statistic for a string value, which you can add at the view or filter level, perform the following steps.

Prerequisite Before you can add a statistic for a flag custom property value, you must add the flag custom property column to the view.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to count the number of items scanned by the department manager, type `Scanned by Manager`.
5. Under **Column**, select the view column with the string values.

6. Under **Function**, select Count.

> **Note:** Count is the only statistical function for string values.

7. Under **Variable**, type the value for the statistic, such as the drawer name or task template name.
8. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

   Example If there is only one items for a specific vendor in your workflow process, and you want to quickly determine if it is an invoice or a purchase order, you can use the **Caption** column to show the **Document Type**.

9. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
10. Click **OK**. The statistic appears below the grid in the **Preview** pane.
11. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Modify a statistic

To modify the components of a statistic defined for a view, complete the following steps.

2. In the **Preview** pane, click the **Statistics** button and then, in the **Statistics** dialog box, click the row of the statistic you want to change.
3. Do one of the following actions.
   - To change the statistic definition, highlight the statistic row and then modify the components you want to change.
   - To reposition the statistic, click **Move Up** to move it ahead of the preceding statistic, or click **Move Down** to move it after the following statistic.
4. Click **OK**.
5. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Remove a statistic

To remove a statistic from a view, complete the following steps.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click the row of the statistic you want to remove and click **Remove**.
4. Click **Yes** in the confirmation prompt and then, in the **Statistics** dialog box, click **OK**.

Result Removing a statistic does not remove the column from the view.